

COUNTY OF LEELANAU
JOB DESCRIPTION

DEPUTY TREASURER/PRINCIPAL RESIDENCE EXEMPTION AUDITOR

Supervised by: County Treasurer, Chief Deputy Treasurer
FLSA: Non-Exempt

GENERAL SUMMARY:

Performs field inspections and investigations of Leelanau County properties to verify eligibility for property tax exemptions (HPRE).

DISTINGUISHING CHARACTERISTICS:

This position involves specialized work in determining or verifying property owner qualification for Principal Residence Exemption. The work involves review of property ownership records, research of other information sources, field inspection, documentation of findings and recommendation as to whether the property and/or owner(s) are qualified for new exemption or maintenance of any existing exemptions.

PRIMARY DUTIES AND RESPONSIBILITIES *(may include but are not limited to the following):*

1. Reviews property records and obtains extracts of pertinent data for documentary evidence. Gathers information from a variety of sources to locate property owner and verify eligibility for homestead exemption.
2. Contacts and interviews witnesses and others involved in the issues of eligibility for one or more exemptions. This may include field inspections of subject property.
3. Processes, compiles researches and analyzes information, and prepares and verifies statements, and reports within established procedures.
4. Provides comprehensive customer service, including delivery of accurate, prompt, and courteous assistance guidelines and standard practices to internal and external customer, both verbally and in writing.
5. Must have excellent telephone communications skills; computer literacy and ability to make field visits when necessary. Attention to detail is essential. Travel in employee's own vehicle is expected with mileage reimbursed. Possession of a current valid driver's license and auto insurance is required.
6. Performs a variety of specialized research and audits regarding accounts in assigned area of responsibility and resolves related discrepancies or erroneous data to ensure compliance with establishes rules, court orders, policies and laws.
7. Works collaboratively with other County employees and government entities to research and resolve issues.
8. Reviews technical and legal documents, determines and takes appropriate action within established guidelines.

9. Enters, verifies and reconciles account information and customer data. Establishes, monitors, maintains, and closes customer accounts as necessary.
10. Sorts, files, and maintains material and filing systems (paper, computer or imaging), retrieves file material, and keeps a record of file movement.
11. Performs a variety of routine clerical activities in support of the assigned department.
12. Uses a wide variety of office machines such as printers, personal computers, facsimile machine, postage machine, adding machines, scanners, and copiers.

EDUCATION, FORMAL TRAINING AND EXPERIENCE:

- High School Diploma or G.E.D.
- One to two years directly related experience.
- Associates degree in related field may substitute for the experience requirement.

PHYSICAL DEMANDS, WORK ENVIRONMENT, AND OTHER REQUIREMENTS:

- Work is performed in an office environment
- May be required to reach with hands and arms, sit; stand; talk and hear; use hands to finger, handle, or feel
- May be required to lift/move up to 50 pounds (such as a box of paper)

KNOWLEDGE, SKILLS, ABILITIES, COMPETENCIES:

- Specialized knowledge related to the department or function
- Skill in use of personal computer software, including BS&A, Accurint, Michigan Tax Tribunal, State of Michigan's Principal Residence Exemption Division, Treasury Department, TAAR (Traverse Area Association of Realtors), Web Voter Center, and Assessor Link USA
- Interpersonal skills necessary to develop and maintain effective and appropriate working relationships with customers, co-workers and representatives of other agencies
- Skilled in researching and resolving problems in order to ensure compliance
- Ability to comprehend process and apply both verbal and written skills appropriate to the job
- Ability to accurately organize and maintain paper documents and electronic files
- Ability to use County resources effectively and efficiently
- Defend findings before the Michigan Tax Tribunal